



This form should be used for all 50/60 series employees for their annual performance evaluation. Please fully complete the form and answer all questions. Please use additional pages if there is not enough space and attach them to this form. For a 6 month review, please disregard Part II, the goal evaluation section.

Employee to be reviewed \_\_\_\_\_ Title \_\_\_\_\_ Department \_\_\_\_\_

Reviewer \_\_\_\_\_ Title \_\_\_\_\_ Department/Board/Commission \_\_\_\_\_

Reviewer's Primary Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

Review Period (Fiscal Year or 6 month review) \_\_\_\_\_

**Evaluation Results**

**Part I:** This portion is used to evaluate the standardized performance dimensions for a 50/60 series employee. **Not all dimensions will apply to all employees.** Please use your best judgment and only use the dimensions that you feel apply to the employee and their position. **You are encouraged to use your own dimensions for #8 through #10.**

|                                   | <b>Number of Completed Questions</b> | <b>Score</b> |
|-----------------------------------|--------------------------------------|--------------|
| Job Knowledge / Core Competencies | _____                                | _____        |
| Administrative Abilities          | _____                                | _____        |
| Communication                     | _____                                | _____        |
| Quality of Work                   | _____                                | _____        |
| Planning / Initiative             | _____                                | _____        |
| Leadership                        | _____                                | _____        |

**Part II:** Goal setting is an important part of the performance evaluation process. Please take the time to fully complete each Goal Assessment Form using the S.M.A.R.T system and G.R.O.W method. It is vital to the process that the reviewer and employee set specific follow-up dates and benchmarks to measure each goal. Please retain a copy of the Goal Assessment Form for you to review throughout the year and to use in progress meetings with the employee.

|  | <b>Number of Completed Questions</b> | <b>Score</b> |
|--|--------------------------------------|--------------|
| Goal Assessment #1                     | _____                                | _____        |
| Goal Assessment #2                     | _____                                | _____        |
| Goal Assessment #3                     | _____                                | _____        |
| <b>TOTAL (add Part I and Part II):</b> | _____                                | _____        |

Please divide the **Score** total by the total **Number of Completed Questions:** \_\_\_\_\_

| 1.00 – 1.49  | 1.50 – 2.49   | 2.5 – 3.49   | 3.50 – 4.49   | 4.50 – 5.00   |
|--|---|--|---|---|
| <b>Ineffective (improvement plan required)</b> – Fails to meet the minimum performance or expectations for the role in general | <b>Partially Successful</b> – Needs to be more consistent when performing and completing job responsibilities | <b>Successful</b> – Employee is an excellent performer and demonstrates a high standard for their quality of work and leadership | <b>Very Successful</b> – Performance exceeded expectations and was beyond the usual quality of work | <b>Distinguished Role Model</b> – Performance and quality of work is consistently recognized as being exceptional |

### Additional Comments

### Acknowledgements

I have reviewed the above performance evaluation and discussed it with my manager/supervisor and have received a copy of it. My signature shall not be construed to mean either agreement or disagreement with the evaluation but rather acknowledgment that the evaluation has been seen by me and discussed with my manager/supervisor. I also understand that I have the right to submit my own statement regarding the results of the evaluation.

Employee Name

Employee Signature

Date

I have fully completed and discussed this performance evaluation with the employee and they have received a copy of it.

Reviewer Name

Reviewer Signature

Date

**Core Competencies / Job Knowledge**

1 = Never/Rarely      2 = Sometimes      3 = Consistent/Dependable      4 = Always      5 = Distinguished Role Model

|   |   |   |   |   |   |     |
|---|---|---|---|---|---|-----|
| 1. Possesses appropriate expertise to perform the job at a professional level   | ① | ② | ③ | ④ | ⑤ | N/A |
| 2. Participates in professional development programs, continuing education opportunities and expands on their knowledge of the position | ① | ② | ③ | ④ | ⑤ | N/A |
| 3. Remains current and knowledgeable on all new professional/technical skills and training associated with the job.                     | ① | ② | ③ | ④ | ⑤ | N/A |
| 4. Takes opportunities to increase knowledge of relevant job skills and looks to increase understanding of other related departments    | ① | ② | ③ | ④ | ⑤ | N/A |
| 5. Embraces new technology and methods in making their department (or role within the department) operate more efficiently              | ① | ② | ③ | ④ | ⑤ | N/A |
| 6. Follows fiscal guidelines, regulations, principles, and standards when committing fiscal or departmental resources                   | ① | ② | ③ | ④ | ⑤ | N/A |
| 7. Applies laws, rules and regulations in a way that the public and employees perceive as fair, objective, uniform and reasonable       | ① | ② | ③ | ④ | ⑤ | N/A |
| 8. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 9. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 10. _____   | ① | ② | ③ | ④ | ⑤ | N/A |

Please provide specific examples and additional information for any metric receiving a 5:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

## Administrative Abilities

1 = Never/Rarely      2 = Sometimes      3 = Consistent/Dependable      4 = Always      5 = Distinguished Role Model

|  |   |   |   |   |   |     |
|--|---|---|---|---|---|-----|
| 1. Manages the department's budget, funds, contracts, compensation changes and purchase orders       | ① | ② | ③ | ④ | ⑤ | N/A |
| 2. Complies with all by-laws, collective bargaining agreements and state and federal employment laws | ① | ② | ③ | ④ | ⑤ | N/A |
| 3. Effectively manages department's vacation and sick leave  | ① | ② | ③ | ④ | ⑤ | N/A |
| 4. Maintains all records in accordance with state and federal regulations                            | ① | ② | ③ | ④ | ⑤ | N/A |
| 5. Provides board members or commissioners agenda items and necessary information in a timely manner | ① | ② | ③ | ④ | ⑤ | N/A |
| 6. Effectively uses the Town's performance management evaluation system                              | ① | ② | ③ | ④ | ⑤ | N/A |
| 7. Complies with all records retention requirements  | ① | ② | ③ | ④ | ⑤ | N/A |
| 8. _____   | ① | ② | ③ | ④ | ⑤ | N/A |
| 9. _____   | ① | ② | ③ | ④ | ⑤ | N/A |
| 10. _____  | ① | ② | ③ | ④ | ⑤ | N/A |

Please provide specific examples and additional information for any metric receiving a 5:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

## Communication

1 = Never/Rarely      2 = Sometimes      3 = Consistent/Dependable      4 = Always      5 = Distinguished Role Model

|   |   |   |   |   |   |     |
|---|---|---|---|---|---|-----|
| 1. Communicates well orally and in written form   | ① | ② | ③ | ④ | ⑤ | N/A |
| 2. Conveys messages using appropriate method of communication (email, phone, in person)   | ① | ② | ③ | ④ | ⑤ | N/A |
| 3. Tailors communication style to the needs of each situation and audience  | ① | ② | ③ | ④ | ⑤ | N/A |
| 4. Effectively uses email and electronic communications, such as text messages, website postings, shared network folders, MUNIS, etc. | ① | ② | ③ | ④ | ⑤ | N/A |
| 5. Uses appropriate tone  | ① | ② | ③ | ④ | ⑤ | N/A |
| 6. Willingly accepts and uses feedback, opinions, criticism, new ideas and comments   | ① | ② | ③ | ④ | ⑤ | N/A |
| 7. Delivers both good and bad news directly, appropriately and in a timely manner   | ① | ② | ③ | ④ | ⑤ | N/A |
| 8. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 9. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 10. _____   | ① | ② | ③ | ④ | ⑤ | N/A |

Please provide specific examples and additional information for any metric receiving a 5:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

## Quality of Work

1 = Never/Rarely      2 = Sometimes      3 = Consistent/Dependable      4 = Always      5 = Distinguished Role Model

1. Work product, tasks and responsibilities are completed in a timely, efficient manner meeting the expected standards of the position      ①      ②      ③      ④      ⑤      N/A

2. Functions within the Town in a professional manner. Attends and is prepared for all required meetings and is punctual      ①      ②      ③      ④      ⑤      N/A

3. Offers creative solutions, new ideas and explores alternative methods to accomplish department tasks      ①      ②      ③      ④      ⑤      N/A

4. Provides regular status updates for major projects and initiatives      ①      ②      ③      ④      ⑤      N/A

5. Work is accurate and free from errors      ①      ②      ③      ④      ⑤      N/A

6. Prioritizes projects based on their importance to the Town, the department and other Town functions      ①      ②      ③      ④      ⑤      N/A

7. Employee's overall work product meets the standard for the position      ①      ②      ③      ④      ⑤      N/A

8. \_\_\_\_\_      ①      ②      ③      ④      ⑤      N/A

9. \_\_\_\_\_      ①      ②      ③      ④      ⑤      N/A

10. \_\_\_\_\_      ①      ②      ③      ④      ⑤      N/A

Please provide specific examples and additional information for any metric receiving a 5:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

**Planning / Initiative**

1 = Never/Rarely      2 = Sometimes      3 = Consistent/Dependable      4 = Always      5 = Distinguished Role Model

|   |   |   |   |   |   |     |
|---|---|---|---|---|---|-----|
| 1. Recognizes and participates in Town wide objectives, projects and goals  | ① | ② | ③ | ④ | ⑤ | N/A |
| 2. Adopts new methods or best practices within the department   | ① | ② | ③ | ④ | ⑤ | N/A |
| 3. Provides employees within his or her department the necessary tools, resources and professional development to succeed | ① | ② | ③ | ④ | ⑤ | N/A |
| 4. Shares responsibility for multi-departmental tasks, responsibilities, projects and goals                               | ① | ② | ③ | ④ | ⑤ | N/A |
| 5. Keeps all departments informed of major developments and provides the necessary materials                              | ① | ② | ③ | ④ | ⑤ | N/A |
| 6. Utilizes strategic plans and/or has a defined vision for the future of the department                                  | ① | ② | ③ | ④ | ⑤ | N/A |
| 7. Identifies future problems and recommends solutions  | ① | ② | ③ | ④ | ⑤ | N/A |
| 8. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 9. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 10. _____   | ① | ② | ③ | ④ | ⑤ | N/A |

Please provide specific examples and additional information for any metric receiving a 5:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

## Leadership

1 = Never/Rarely      2 = Sometimes      3 = Consistent/Dependable      4 = Always      5 = Distinguished Role Model

|   |   |   |   |   |   |     |
|---|---|---|---|---|---|-----|
| 1. Fosters a work environment that builds trust and mutual respect  | ① | ② | ③ | ④ | ⑤ | N/A |
| 2. Advocates for programs, policies and procedures for the employee's department  | ① | ② | ③ | ④ | ⑤ | N/A |
| 3. Presents a positive image to Town residents, employees, volunteers and visitors                                      | ① | ② | ③ | ④ | ⑤ | N/A |
| 4. Supports team work and building relationships to achieve goals/projects/objectives that involve multiple departments | ① | ② | ③ | ④ | ⑤ | N/A |
| 5. Allows for differences in approach and style   | ① | ② | ③ | ④ | ⑤ | N/A |
| 6. Makes decisions in a timely manner that are clear, consistent and transparent  | ① | ② | ③ | ④ | ⑤ | N/A |
| 7. Accepts responsibility for department's work   | ① | ② | ③ | ④ | ⑤ | N/A |
| 8. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 9. _____  | ① | ② | ③ | ④ | ⑤ | N/A |
| 10. _____   | ① | ② | ③ | ④ | ⑤ | N/A |

Please provide specific examples and additional information for any metric receiving a 5:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

**Goal setting is a vital component to the performance evaluation process. Take the time to complete the goal setting forms which will help you to construct impactful goals, use benchmarks and schedule follow-up meetings.**

### **How to develop goals using the GROW model**

The GROW model was developed and used extensively in the U.K. as well as in the U.S. over the past 20 years and offers a time-tested and effective model for coaching employees about goal setting and performance. The model offers a highly useful set of probes that can help lead employees to write and execute effective goals.

If you need assistance in developing your goals, the GROW model can help to focus your ideas and plan your goals.

**Goals:** First, define and agree on a goal or desired outcome to be achieved. Use the following questions to better focus and define the goal so that it is specific, measurable and realistic.

- What is it you would like to focus on?
- What would you like to achieve?
- What would you like to happen that is not happening now?
- How would you know you were being successful if you achieved your goal?
- How could you break this goal down into manageable chunks?
- What are all the things that would need to be done to achieve the goal?

**Realities:** Next, explore the current situation within your department and discuss facts related to your goal.

- What is happening at the moment to derail your progress toward the goal?
- When and how often does this happen? Be precise if possible.
- What effect does this have?
- What other factors are relevant?
- Who else is relevant?
- What is that person's perception of the situation?
- What have you tried so far?
- What else is conflicting with achieving the goal?

**Options:** Determine what choices and decisions you have to make in reaching your goal. Explore possible alternatives that may be available throughout the process and where you can obtain support and resources.

- What possibilities for action do you see?
- Who might be able to help?
- Which options do you like the most?
- What are the benefits and pitfalls of these options?
- Which options are of interest to you?
- Rate from 1 to 10 your assessment of the practicality of each of these options.
- Would you like to choose an option to act on?

**Will:** Commit to determining what actions are necessary, set deadlines and establish benchmarks on the path to achieving your goal.

- What are your next steps?
- Precisely when will you take them?
- What might get in the way?
- What support do you need?
- Can you see some real benefit coming from this for yourself and others?
- Are you excited by the prospect?

## Writing SMART Goals

One of the most commonly used and accepted methods of goal setting is the SMART method. The purpose of SMART goal setting is to help employees and supervisors develop goals that are specific, achievable and have a positive outcome. By using the SMART method, your goals will be easier to achieve and give you the ability to demonstrate your success throughout the process.

**Sample Goal** *By December 1<sup>st</sup>, I want to get healthier by losing 25 pounds and reducing my cholesterol level to under 190. I will do this by eating vegetables at every meal and spending 2 hours at my health club at least 3 times per week.*

**Specific** Goals should be simplistically written and clearly define what the employee is going to do. “Specific” is the What, Why and How of the SMART model. Identify a location. Establish a time frame. Identify requirements and constraints. Identify specific reasons or the benefits of accomplishing the goal.

**What:** “losing 25 pounds and reducing my cholesterol level to under 190”

**How:** “eating vegetables at every meal and spending 2 hours at my health club”

**Why:** “I want to get healthier”

**Measurable** Establish concrete standards, dates and benchmarks for measuring progress toward the attainment of each goal. To determine if your goal is measurable, ask questions such as: How much? How many? How will I know when it is accomplished?

The **Sample Goal** clearly gives specific metrics that will objectively tell if that goal has been met; losing 25 pounds, reduce cholesterol to under 190, visit health club 3 times per week.

**Achievable** Goals should be achievable by the next performance review. The goals should be able to push the employee enough so they feel challenged, but defined well enough so that the goals can be achieved. The achievement of the goal should utilize their current knowledge, skills and abilities, or make acquiring the necessary knowledge, skills or abilities part of the goal setting process.

**Relevant** The goal needs to tie into the employee’s key responsibilities and be important to the mission of the department.

The **Sample Goal** uses health as a motivating factor, and would be relevant to any person’s lifestyle. Likewise, the goal should be focused on bettering the employee and the department.

**Timely** Goals should be linked to a timeframe that creates a practical sense of urgency, or results in tension between the current reality and the vision of the goal. Without such tension, the goal is unlikely to produce a relevant outcome.

The **Sample Goal** gives the specific deadline of December 1<sup>st</sup> for accomplishing the goal.

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*John Whitmore, Coaching for Performance: GROWing Human Potential and Purpose—The Principles and Practice of Coaching and Leadership (fourth edition), October 10, 2009.*

<http://www.oracle.com/us/media1/goal-setting-fresh-perspective-ee-1679275.pdf>

[http://www.hr.virginia.edu/uploads/documents/media/Writing\\_SMART\\_Goals.pdf](http://www.hr.virginia.edu/uploads/documents/media/Writing_SMART_Goals.pdf)

## Goal Assessment Form

Type of goal:    Personal Growth/Improvement       Job Function/Responsibility       Special Project

Goal:

What is the expected impact on the employee's performance and/or departmental function:

How will this goal be considered achieved:

Expected achievement date:

### Steps to achieve goal

List detailed steps, dates and/or benchmarks required to accomplish the stated goal. Use additional pages if needed.

- 1.
- 2.
- 3.
- 4.
- 5.

### Progress Update

Set a date to review the progress of the goal

Progress review date:

Progress report:

- No progress** – There has been little to no evidence of progress towards the goal.       **Some progress** – The employee is on track to achieve the goal.       **Near completion** – The employee is near to completing the goal.

Notes:

## Goal Assessment Form

Type of goal:    Personal Growth/Improvement       Job Function/Responsibility       Special Project

Goal:

What is the expected impact on the employee's performance and/or departmental function:

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Expected achievement date:

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List detailed steps, dates and/or benchmarks required to accomplish the stated goal. Use additional pages if needed.

- 1.
- 2.
- 3.
- 4.
- 5.

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Notes:

## Goal Evaluation Form

Status:       Achieved               Partially Achieved               Not Achieved

Goal:

Evaluating the success of a goal is more than determining if it has been achieved or not. Evaluate the employee's performance in the steps taken to complete the goal and indicate the impact that accomplishing the goal has had on the department and/or the employee.

1 = Ineffective      2 = Partially Successful      3 = Successful      4 = Very Successful      5 = Distinguished Role Model

**Communication:** How effective was the employee's communication skills in achieving the goal?      ①    ②    ③    ④    ⑤    N/A

**Quality of Work:** Did the employee meet the expected quality of work?      ①    ②    ③    ④    ⑤    N/A

**Productivity:** Did the employee consistently meet the set benchmarks and deadlines?      ①    ②    ③    ④    ⑤    N/A

**Improvement:** Did achieving the goal demonstrate a positive outcome for the employee and/or department?      ①    ②    ③    ④    ⑤    N/A

**Adaptability:** How successfully did the employee manage changes, setbacks or interruptions in accomplishing the goal?      ①    ②    ③    ④    ⑤    N/A

Comments:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

## Goal Evaluation Form

Status:       Achieved               Partially Achieved               Not Achieved

Goal:

Evaluating the success of a goal is more than determining if it has been achieved or not. Evaluate the employee's performance in the steps taken to complete the goal and indicate the impact that accomplishing the goal has had on the department and/or the employee.

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**Communication:** How effective was the employee's communication skills in achieving the goal?      ①    ②    ③    ④    ⑤    N/A

**Quality of Work:** Did the employee meet the expected quality of work?      ①    ②    ③    ④    ⑤    N/A

**Productivity:** Did the employee consistently meet the set benchmarks and deadlines?      ①    ②    ③    ④    ⑤    N/A

**Improvement:** Did achieving the goal demonstrate a positive outcome for the employee and/or department?      ①    ②    ③    ④    ⑤    N/A

**Adaptability:** How successfully did the employee manage changes, setbacks or interruptions in accomplishing the goal?      ①    ②    ③    ④    ⑤    N/A

Comments:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_

## Goal Evaluation Form

Status:       Achieved               Partially Achieved               Not Achieved

Goal:

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**Quality of Work:** Did the employee meet the expected quality of work?      ①    ②    ③    ④    ⑤    N/A

**Productivity:** Did the employee consistently meet the set benchmarks and deadlines?      ①    ②    ③    ④    ⑤    N/A

**Improvement:** Did achieving the goal demonstrate a positive outcome for the employee and/or department?      ①    ②    ③    ④    ⑤    N/A

**Adaptability:** How successfully did the employee manage changes, setbacks or interruptions in accomplishing the goal?      ①    ②    ③    ④    ⑤    N/A

Comments:

**Number of Questions Completed:** \_\_\_\_\_

**Score:** \_\_\_\_\_